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Personal Income Tax Checklist

To assist in the preparation of your Personal Income Tax Return, please complete this form and attach the supporting documentation. (Optional – total receipts by category and attach a calculator tape.)
In the event of an audit, the onus of proof is on the taxpayer; unsupported claims may be denied.
Generally you must keep your records for six years from the end of the taxation year to which they relate.

New Client or New Information

Name _____
Street _____ Apt. # _____ Cell _____
City _____ Postal _____ SIN _____-_____-_____
Email _____ Birthday (YYYY/MM/DD) _____ / _____ / _____

Residence

Total property tax paid $_____ or rent paid $_____ and Landlord name _____

Marital Status

☐ Married ☐ Separated ☐ Divorced Spose Name _____ SIN _____-_____-_____
☐ Common-law ☐ Date of status change Spouse Birthday (YYYY/MM/DD) _____ / _____ / _____
☐ Single ____ / ____ / _____ Spouse: Net Income (line 236 from T1) $_____

☐ Direct Deposit: Branch # ☐☐☐☐☐ Institution # ☐☐☐ Account # ☐☐☐☐☐☐☐☐☐☐☐☐
(Do not complete it if your direct deposit information has not changed)

Dependents

Name	Birthday (mm/dd/yyyy)	SIN	Gender M/F	Net Income, $

Other

☐ Are you a Canadian citizen? Y N
☐ Release information to Electons Canada? Y N
☐ Direct deposit HST credit, Tax Refund and/or Child Tax Benefit? Y N (if YES, please supply VOID cheque)
☐ Did you hold any foreign property in the year, where the total cost exceeded $100,000 CDN? Y N
☐ First-Time Home Buyer? Property address _____ Acquisition date _____

Documents New Client

☐ Notice of Assessment ☐ Prior year tax return and schedules (For NEW client) ☐ Summary of instalments and receipts

Personal

☐ T4 - Employment Income
☐ T4A (OAS) - Old Age Security
☐ T4A (P) - CPP Benefits
☐ T4A - Pension and other income
☐ T4E - Employment Insurance benefits
☐ T5007 - Social Assistance/WCB
☐ T4 RSP - RRSP Income
☐ T4 RIF - RRIF Income
☐ RC 62 - Universal Child Care Benefit

Investment

☐ T3 - Estate/Trust/Mutual Funds Income
☐ T5 / T3 - Interest and Dividend Income
☐ T600 - Canada Savings Bonds
☐ T5008 - Statement of Security Transactions
☐ T5013 - Limited Partnership Income
☐ Capital Gains/(Losses) including PROPERTY SOLD
☐ Rental Income & Expenses (please provide details)
☐ Foreign Income
☐ Interest on Tax Refund(s) $_____

Deductions

☐ RRSP Contribution Receipts
☐ Union, Professional Dues
☐ Alimony Paid: $_____
☐ Deductible Child Support Paid: $_____
☐ Safety Deposit Box Charges: $_____
☐ Interest and Carrying Charges on Investments
☐ Investment Counsel and Accounting fees
☐ Employment Expenses (use checklist)
(You require a signed T2200 Form)
☐ Deductible Legal Fees
☐ Child Care Expenses
☐ Child Fitness & Art Tax Credit
☐ Moving Expenses
☐ Allowable Business Investment Losses
☐ Capital Loss Carry Forwards
☐ Non-Capital Loss Carry Forwards
☐ Limited Partnership Losses of Other Years
☐ Employment Insurance Benefit Repayments

Tax Credits

☐ T2201 - Disability Deduction
☐ T2202 - Tuition Fees/Education Credit
☐ Public Transit Passes
☐ Medical Receipts
☐ Attendant Care Expenses
☐ Working Opportunity Fund